

Policy Academy Meeting Minutes December 15, 2010

Present: Mike Greco, Lea Collins-Worachek, Cherry Barnes, Enid Glenn, Sharon LaRose, Anna Eggebrecht, Sam Grimes, Annette Rollin, John Haugh, Sue Munger, Cecilia Pohs, Allison Gordon, Linda Raap, Kathleen Hart, Karla Opatz, Keith Iris,

Updates from Management

Mike/John

- RSA Audit- March 15th. Report not yet received. Anticipate early spring.
- Already working on issues raised as part of exit interview.
- 4,141 individuals on waitlist.
- 765 activated.
- 8,700 individuals in training.
- Status 20- 5,000.
- 15,793 IPEs
- 26's: 19% of year, at 17.3% of goal.
- Rehab Rate 62.5%. Staff are encouraged to check on their rate, the WDA rate, and State rate.
- 93.8% Eligibilities within 60 days.
- 80% IPEs within 90 days.
- ARRA Funds: OJT Goal 450. 686 OJTs to date.
- 24 million in cost for cases. Estimated earnings 48.9 million. 196% return.
- SSI/SSDI- 43 % of caseload.
- State Internships. 74 placements in state agencies- 17 agencies. 42 individuals have had their LTE's extended and employers want to keep them on.
- MRS 27- Related to DVR certifying a person with a disability with an agency in a training capacity - direct hire. Allows the consumer to be immune from the exam process if position opens. Working on getting this into effect.
- Hiring 21 project positions with SSI/SSDI reimbursement dollars.
- CCC- 7 perm. 4 project. In final approval process.
- Anticipate 20 new staff in training in Feb.
- Study done by UWM that state employees are compensated at 6% less then private employees taking into consideration wages and benefits.
- RSA Commissioner wrote letter to IL requesting VR be protected from furloughs.
- Chapter 47 proposed changes were shared as a handout and reviewed. Suggested changes related to BEP, removal of Homecraft, aligning language with Rehab Act.

BOND

Amy Thomson

- Handouts provided.
- Benefits Offset National Demonstration-BOND
- DHS- Pathways has been subcontracted with for this program.
- Pilot in Wisconsin begins in January 2011.
- Goal of program is help beneficiaries with disabilities return to work.
- Test a \$1 reduction in benefits for every \$2 in earnings over SGA, in combination with benefits counseling.
- Stage 1 and Stage 2- Random selection for treatment and control groups.
- Enrollment for 2 years and goes through 2017.
- DHS is contracting with various sites around the state for benefits counseling for the program.

Reviewed and approved the following recommended updates:

DVR Fee Schedule language

- Removal of reference to fee schedules.
- Delegated spending authority- included in Appendix 1.

Feasibility Study

- Now own step- Step 3.
- Change proposed to highlight the importance of the feasibility study, the purpose of the study, how it is done, and decisions/conclusions that should be made based upon the outcome.
- Feasibility of proposed business is determined at this time- not at time of BP review unless proposed business changes.
- Link included for a case example that walks through the process.
- Committee can be used as resource or technical assistance when determining feasibility.

Role of the Committee:

- When BP goes to committee feasibility and appropriateness of goal would already be determined. Role of committee was not clear.
- Proposed language: The role of the Business Plan Review Committee is not to determine if the proposed business is feasible or if the consumer has the necessary skills and abilities to succeed in self-employment with or without accommodations. These issues should have been addressed earlier in the process. (also clarified review checklist)
 - Add flexibility to language that consumer can move through process quicker- not have to meet in person with committee, can suggest review outside of meeting.

Dual Track IPE Goals

- Discussion on background.
- Writing the IPE goal as dual track is the recommended process. Should be able to occur in most cases. Include language that there could be an exception to this. Proposed language:
Dual track goals were established to allow consumers choice throughout the self-employment process, however this recommended process should allow for exceptions when warranted. If the consumer and counselor agree that a goal should focus exclusively on the occupation through self-employment the counselor should consult with his/her supervisor for how best to proceed.

Order of Steps for BP Review and Approval

- Change proposed to reorder the steps involving BP review and approval process.
- It was felt that the new order allows the consumer to identify any comparable benefits, potential outside funding source and come prepared to the Business Plan Review Committee with this information- DVR financial contribution can then be determined.
- Current process: Review by Consultant, Counselor & Consumer, BPRC; DVR Approval and Contribution, Potential Investors, DVR contribution finalized.
- Proposed process: Counselor & Consumer Review, Consultant Review, C & C if needed, Submit to Potential Investors; Counselor & Consumer Review for BPRC, BPRC; Identify DVR financial contribution.

Appendices

- Ordering- in order of when discussed in toolkit.
- Removal of Appendix 3- Inventions
- Appendix 10- Feasibility/Market analysis- NEW!
- Submission Checklist- addition that proposed business was determined feasible and discussion on credit.

- BP Review checklist- ensure align with BP outline; removal of questions that would circle back around to feasibility, removal of breakeven analysis (not appropriate), removal of credit.

Removal of consumer section (separate document), BPRC section

Training:

- Discussed training needs of staff related to SE. Shared input from Directors meeting. Will take to Training Academy.

Potential 28s

Linda/Mike

- Discussion regarding losing contact with consumer, potential 28's- could be working. What is your experience with this and waiting to get UI data?
- What WDAs are doing:
 - WDA 11 does a UI check and case notes what is found. Use Outlook to schedule follow-up to recheck to see if there is UI data. Working to contact consumer during this time period.
 - Having someone call from a different number or blocking number can help.
 - When a potential 28 the team discusses case and brainstorm how best to proceed. Some WDA directors have worked to contact consumer directly.
- If working to do some of things should be case noting what is occurring and why contact is not being maintained. How we are working to engage individual.
- RSA reported that WI closes case quicker than other cases. Average 27 months.
- If running into difficulty in contacting and getting burned out, maybe another counselor or staff can work to attempt to get contacts.
- WDA's are finding UI data very helpful.
- Offer follow-along \$25 for information.
- Need to ensure all other closure documentation is being used.
- Possible reasons case are closed:
 - Article had been sent around regarding why some cases may be closed 28s.
 - Consumers' working through multiple counselors- consumer is disengaged due to this.
 - Not receiving any services from us at this time.
- Recommend every WDA develop a Status 28 plan. Including:
 - Contacting and engaging consumers
 - Developing strategic plan
 - Discuss and develop best practices
- Look at mechanism to get UI out on regular basis.

WDA Questions

Sam

- *When farmers receive a disability benefit is there any problem proceeding with appropriate accommodation if they don't plan on working off their benefits?*
 - No. We need to look at cases individually and provide services that are appropriate and necessary to support the agreed to IPE goal.
- *Do we look at cases differently if receiving retirement benefits as main source of income?*
 - No. Law does not support this. Age does not play a factor or their intent to work off benefits. Look at what is appropriate and necessary for the consumer to achieve his/her agreed to IPE goal.
- *Self-employed individuals including farmers will show losses with net income. Should we align our income guidelines at file closure with what SSA looks at income for TWW or SGA?*
 - For SE individuals we look at gross income for closure.

- For SSI/SSDI SE consumers whose goal is to work at TWW or SGA, SSA looks at net income minus impairment related work expenses and subsidizes. This will be explored further and we will look at the language in the toolkits to ensure this is clear.
- *When a student opts into a degree-in-3 (fast track program), they are then no eligible for help during the extra months that they are in school because of the \$4500/year. Can changes be made to TG process to allow for these students to complete a degree in 3 years?*
 - Policy is not that it is capped at \$4500. Exception process should be used- to cover up to DVR unmet need.

Consumer Correspondence Appeals

Kristin

- Kristin shared letters that consumers receive through the appeal process.
- Review of letters- make sure information included is necessary and should be included.
- Recommendations:
 - Include language that they can have a representative assist them through the process.
 - Clarify difference between if consumer wants to appeal something or wants an actual hearing. Not clear to consumers.
 - 7 days language- you will have seven days to decide which impartial hearing officer you wish to select. If you do not select one, one will be chosen for you. Felt 7 days was appropriate.
 - Identify when the 7 days start and if 7 business days.
 - If you receive SSI/SSDI- DRW can assist you.
 - CAP contact- explain that CAP may not represent you. They will determine that. Suggested language shared by CAP.
 - Consider including DRW as possible representation.
 - Copy of record to consumer- will be looking at current process. Enid and Linda will work with Kristin on this.
- Is it possible to have more prescriptive IHO decisions? Decision that can be referred back to when topics are brought back up again by the consumer and in future case. Discuss topic further.

Activation Letter

Linda V.

- CAP 800 number listed in activation letter. Does the number need to be included as the consumer will not be contacting CAP to appeal activation?
- Consumers are contacting CAP thinking they are DVR.
- Recommend that WDA's remove this form the activation letter.
- Remind at Directors meeting this should be removed.

SSI/SSDI Wage data

Mike

- SSI/SSDI Wage Data- Drop in our reimbursement.
- Bring up at meetings and talk about this. Follow-up with those consumers.
- Follow-up on training needs.
- Include SSA in training.

TAKE BACKS:

- **Data updates from Management**
- **BOND information**
- **SE Toolkit Updates**
- **Removal of CAP 800 number from activation letters.**
- **Drop in wage reimbursement- need to get wages attached to IRIS. Follow-up with consumers. Discuss this in your WDAs.**